



MCQUAIG PRESENTS

THE ADVANCED GUIDE TO ONBOARDING





Introduction

The first few months on the job are critical to the success of a new hire. Outside of filling out HR paperwork, setting up technology, and sitting through orientation, this period, referred to as the onboarding phase, introduces the employee to the company policies, procedures, and leadership. Onboarding is the first introduction to the company a new hire receives and that's not an opportunity that should be wasted. Employee onboarding has many benefits for both new hires and the company. A strong onboarding process helps increase the productivity levels of employees sooner. It also provides new hires a safety net that makes them feel supported as they learn new tasks and take on increasingly complex projects. It's part of the overall positive experience that employees need to be successful in the long-term.

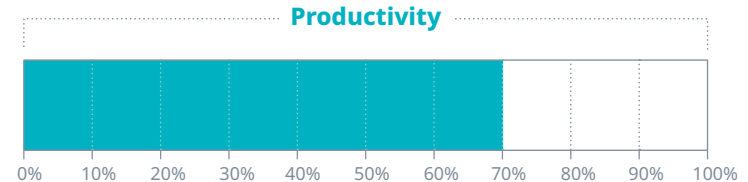
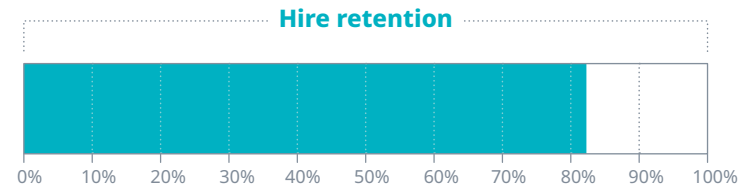
Before we go any further, please note this guide is meant to be a resource for giving your current onboarding a boost to take it to the next level. If you need help setting up your onboarding program right from the beginning, please try our eBook "**The Quick Guide to Onboarding**" to get started.



What do the numbers say?

We know onboarding is important but what do the experts say on the power of a structured onboarding program?

- Organizations that have a strong onboarding process are shown to increase new hire retention by 82%, and productivity by just over 70%.¹
- When employees have a negative new hire onboarding, they are twice as likely to seek out another job.²
- 87% of companies that use a buddy system during onboarding report that it's an effective way to boost new hire productivity.³
- 20% of staff turnover happens within the first 45 days.⁴



Onboarding increases new hire retention by **82%** and productivity by **70%**

No one likes to feel off balance or out of place and onboarding can go a long way to welcome a new hire into the company and culture, especially when it's done right.



Give your onboarding program a boost?

While traditional onboarding is a good place to start, there are alternative onboarding methods that can make life easier for HR and new hires. In the remainder of this book, we'll explore ways to update traditional onboarding at all relevant stages of a new hire's ramp up. These tactics are all strategies taken from real world companies who have found success with shaking up their approach to onboarding.

With the war for talent making it hard to find and retain great employees, onboarding is one way to make your company stand out in the crowd. Employees who go through a memorable or fun onboarding program are more likely to transfers those positive feelings to the company itself and become an integrated part of the workforce faster.

Tip: With the war for talent making it hard to find and retain great employees, onboarding is one way to make your company stand out in the crowd.





Before day one

Congratulations, you've found that next great hire and they've accepted your offer. You're in the clear until they show up on day one, right? Actually, there are a number of tactics you can use before your new employee even shows up for work to help smooth their way. Walking into a new company for the first time always comes with some anxiety or nervousness. Employers can help new hires start off on the right foot by acknowledging that very human fear and taking steps to help decrease its impact. Take the opportunity to touch base with your candidate before they start. Forewarning gives employees a sense of their new company and colleagues and turns the uncertainty of their first day into confidence.



Digital welcome package

As soon as the offer is signed, you can send your new hire a digital welcome package to get them situated and answer any questions that may have lingered from the interview. A welcome package could include an internal extension call list for the company, a map of the building or surrounding location, a list of food vendors within walking distance for lunches, any company content about the history of the organization or their mission and values, HR rules of the company such as dress code or flexible hour regulations, a summary of job duties, and information about the team a new hire is joining. Becoming more aware of the situation they're walking into helps new hires feel more comfortable and less overwhelmed on day one.

Online orientation

If you really want to take advantage of technology, consider building out an online orientation program. **Similar to the welcome package, the idea is to provide the candidate with the information they'll need on day one, or their first week, before they even arrive.** An online orientation could include modules on the history of the company and their mission, HR guidelines, role specific modules on team members or duties or performance expectations, and definitely have a module on the corporate culture with videos or photos supporting that message. If you have a strong culture, sharing it with new hires can excite them to come work for you.





Buddy system

This tactic should be used at multiple stages of the onboarding process, but it can start before day one. A buddy system is when a current employee is paired with the new hire to be a resource and a guide. **Using buddies helps new hires feel more secure as they have someone in their corner that can lend a hand when they need it.** Buddies also serve as a safe space to ask questions an employee might not want to bring up to their new boss. They also help in a social context and act as an entry point into the larger work community. Leveraging buddies at any step of the process is helpful but if you set up the connection before the employee starts, they'll walk into the building feeling like they already know someone. It doesn't have to take much time, either. A buddy can send an introduction email and be available a few days prior to the start date to help make the new hire feel more welcome.

CEO messages

While effective, an online orientation program does take time to build. If you don't have the time or resources, a quicker solution is to have the CEO or company founder record a video message for new employees. **That message can then be shared as part of a welcome package, online orientation, or separately to give the employee a better sense of the company they're joining and the leader they'll be following.** A message at this stage also helps break down barriers as employees feel more welcomed to the team and company. And if you're CEO has an open-door policy, this is a great time to convey it to employees.





From day one through week one

Impressions made on day one can have long term impact, both for the new hire and their team. As much as the employee wants to start off on the right foot, you should too. If your onboarding looks like a day of sitting in a room listening to a manager or HR talk then it's time to shake things up. Day one is an emotional day of many new hires. Heightened anxiety or stress, feeling off balance, or even a high level of excitement can impact memory retention. So that day of talking might check the boxes on your onboarding list, but the new hire will probably come into work a week later and not remember much of what they heard. So how can we make this first day more impactful and actually help employees retain the information they need?



Welcome meals

One strategy is to spend the first day focused on culture and team building, rather than information. Welcome meals can follow several different paths. The most common is a team lunch when a new hire starts so everyone can get to know each other in a more relaxed atmosphere. A variation of this is a cross-team lunch when a new hire's team and key members they'll be working with from other departments

are invited. And the last type of lunch, which is harder to coordinate but makes a lasting impact, is one with senior management or company leaders. **With younger generations entering the workforce, a key theme has become employees wanting more access to leadership.**⁵ Meeting these leaders on day one helps employees believe in their vision.





Online learning portal

If you want to focus on information on day one, one way to help employees retain what they learn is to give them ongoing access to it. An online learning portal, similar to online orientation program, should be built with modules related to HR, the company and culture, the job specific details, and any other information a hire might need to refer back to within their first 3-6 months. **Having access to a portal allows employees to learn at their own speed and becomes a resource as they settle into their role.** A digital version of the employee handbook should be accessible within the portal as well in case new hires have questions about benefits or rules in the future.

Scavenger hunts

Who doesn't love searching for treasure? Update the party game with a corporate twist and give new employees a list of items, photos, or signatures they need to collect within the office. As they go through their list, they should be meeting with key team or company members, learning the layout of the office, finding where to go for information such as HR regulations, and best of all, they have fun doing it which leads to better memory retention.⁶ One caveat here is that this tactic is more useful in large workspaces where employees might be dealing with multiple departments.

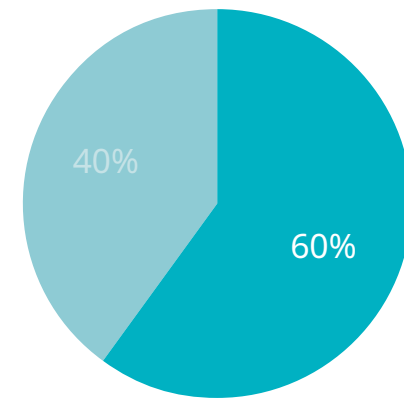




Gamification

When in doubt, try making things a game. Humans learn and remember better when their brains experience higher levels of dopamine.⁷ Gamifying onboarding helps achieve that aim. While this strategy can be digital, like playing a video game, is doesn't have to be. **One strategy to gamify onboarding is to "level up." As employees achieve their onboarding tasks or training, whether online or in person, they collect points towards unlocking the next level.** An added benefit of this approach is it forces HR or the manager to set clear and attainable goals and allows for a way to track progress. Nearly 60% of organizations don't set goals during onboarding and that can convey a sense that the company doesn't have a targeted approach or that the employee will be left to

their own devices.⁸ Another way to motivate with gamification is through leaderboards and rewards. If you are onboarding as a group, healthy competition can help motivate new hires to work quickly through their onboarding materials. Rewards can then be given for retention and/or speed. And remember, while everyone loves a good gift card, rewards don't have to be monetary. They can come in the form of badges or points that employees collect while working towards something bigger, such as an early afternoon off or a treat of some sort.



60% of companies don't set onboarding goals



Between week one and month three

Alright, this tactic isn't so much an alternative strategy as it is simply a point that needs to be hammered home. If you are not checking in with your new employee, you are doing both your team and your new hire a disservice. And no, your weekly team meetings don't count. You need personal checkpoints focused on onboarding, progression, and development to get a real sense of how your new hire is doing and where they are struggling. Set meetings well in advance with a clear structure of what will be discussed so the new hire can come prepared. And most importantly, these meetings are not to uncover areas of weakness or failure. **They should be supportive, blameless conversations about how the employee is settling in and what, if anything, needs to happen to help them reach the next level of productivity or success.** These checkpoints also provide time for new employees and managers to connect and develop deeper working relationships which can directly impact the length of an employee's tenure at a company.



Checkpoints

Many companies think that once you make it past week one you're in the clear. A new hire has their work station set up by that point and has probably completed HR's onboarding checklist. Surely that means they've learned all the basics they need to know, right? Wrong. Learning isn't immediate and often we have to be exposed to the same information multiple times to properly retain it. In fact, think back to your own first week of your current role. Is it anything more than a blurred haze to you now?

The first week of a new job is often stressful and full of information that might overwhelm a new employee. Once you've moved beyond that first intro week, don't toss your new hire into the deep end. The first three months of an employee's tenure should be focused on gaining knowledge and teaching new hires how to walk before asking them to run.





Learning based projects

Often companies need new hires on their feet as quickly as possible to relieve some of the pressure from the rest of the team that has been understaffed. But taking a strategic approach to an employee's first few projects can make a difference in their onboarding success. **Projects that are learning focused early on help employees better understand their company and role while providing that extra exposure to key pieces of information.** Learning tasks could be historical research such as a new marketer doing a 3 year review of the best campaigns run by the company. Or they could be innovation focused, asking a designer to create a new ad based on examples of competitor advertisements without seeing any examples from their own company first. The point is to give them work that has the opportunity to strengthen their onboarding training and further their connection to the company.

Use apps

There really is an app for everything. If you want to go the technology route, there are apps available that can help monitor and roll out an onboarding program. Later in the process, apps can come in handy for communication and engagement tracking. **Anonymous feedback apps allow managers to poll their new hires or their teams to collect feedback on a certain question.** For remote workers, apps can also help new hires connect and stay in touch with their team members. On a company level, if turnover is getting higher, apps can be used to gather company wide insights to see if there is a reason new hires are running for the door. Apps can also be used to motivate and reward with a number of them having the option to give peers points or stars to reward a job well done and drive employee engagement.



Between three months and six months

By three months, your new employees should be getting their legs under them. Most probations end at some point between the three and six month period and the expectation should be that the employee is moving from their learning phase into their producing phase. More responsibility or larger projects can be added at this level. But keep in mind, onboarding is not over. New hires at this stage may be more independent but there are still things they don't know or need support with. And as employees move away from their first few months of learning, they're likely starting to pay more attention to office politics or social dynamics. For a manager, this is your time to shine. Onboarding from this point should still be about support and training but it should also touch on retention and what the employee can look forward to in the future. After all, you want to train great people and then have them stay with the company for years. So at this stage of the game, it's not just all about the employee but you as well.



Start career planning early

Everyone wants to know they're improving. Research shows that career progression is a key factor for Millennials and Gen Zs when choosing, and staying, at a job. In fact, a recent study suggests 75% of Gen Z employees believe they'll deserve a promotion within their first year of work, and 32% believe it should happen within their first 6 months.⁹ **Get ahead of the conversation by building career progression goals and timelines directly into the onboarding process.** Let new employees know what different career options could look like within the company and what they'd need to achieve in order to get there. If you do build career planning into onboarding, remember to touch base on the subject periodically throughout the year and during performance reviews so employees have a real sense of where they are and where they're going.

Show the end results of projects

One way to motivate new hires is to show them how their work is used from start to finish. It's one thing to work on a project but often that work then gets moved on to higher circles as more senior hands take over. **If a new hire is working on a multi-phase or multi-department project, let them see where it ends up.** That could be as simple as a conversation about results or inviting the new hire to shadow a more senior meeting. When employees feel like their contributions are not only valued, but actually help push the company's goals forward, they see how they fit into the structure of the company and what they can bring to the table.





Six months and beyond

At six months, only the best onboarding programs are still checking in. Make sure that includes you! By this point, your new hire should be producing at a decent level and be integrated into their team or department. The direct onboarding at this point becomes less hands on but make sure you are taking the time to check in with your new hire. The six month mark is a great time to see how your employee is developing and what they're feeling towards the organization. If an employee is unhappy at this point, your focus should shift from training to retaining. If they are happy, you can start the process of easing them into their regular roles post onboarding.



Year long mentors

Having a buddy system is one thing but if your company has the capabilities and the resources, year long mentors can help develop new employees. **These are often colleagues with more experience or in aspirational positions who can impart the knowledge they've accumulated themselves.** This also builds in an ongoing support system for new hires which can be helpful as they move from onboarding to onboarded. Mentorship programs also strengthen the interpersonal relationships between peers which, in turn, helps improve overall retention rates. People like to work with people they know and trust. Having a year long mentor solidifies that connection.

Analyze your metrics

While this one should go without saying, you'd be surprised by how many companies never examine whether their onboarding program is even effective. It's great to have all the bells and whistles in an onboarding program but if it's not doing its job, then something needs to change. Without tracking success, you'll be aiming blind. **Monitor onboarding programs metrics and track the retention rates, job satisfaction, and net promoter scores of new employees.** If those numbers start to fall, then it's time to re-examine your program. If they stay strong, you're on the right track.





Off boarding

The goal of onboarding is to set your employees up for success and keep them around as long as possible. But this is the 21st century, after all, and the idea of an employee spending their entire career in one place is getting further and further away. While it's never fun to think of the end right from the start, off boarding can be a real game changer.

Off boarding is when you develop a plan and strategy to guide conversations such as exit interviews and project wrap ups. Having a formal off boarding program helps smooth the transition from one person to the next within a role and ensures there's less of a knowledge lag due to turnover. Off boarding is also a chance

for companies to make their last impression. With the war of talent in full swing and modern career trajectories carving out new paths, you don't ever want to close the door on a good employee. If the person leaving is someone the company might want back at some point, make sure your off boarding program lets them know they're welcome to reapply. If you have a direct recruiting channel specific for rehires, let employees know how to use it before they walk out the door. Boomerang hires are becoming increasingly important so make sure if you're losing great talent, you're doing something to try and bring them back to you in the future.





Conclusion

Onboarding takes time and effort to be done well. It takes even more energy to knock it out of the park. **But when you invest in a strong onboarding program, you're not only providing a positive employee experience to a new hire, you're laying the groundwork to keep those great workers longer.** With turnover in the first year of work getting ever higher, it's important to remember that onboarding isn't just about training but also about conveying to the employee what the culture is like at your organization and why they should want to be a part of it. Onboarding should gear your employees up for success right from day one (or even before). By adding alternative tactics such as the ones found in this eBook, you can breathe new life into your onboarding program and increase employee memory retention and engagement. And don't be afraid to get creative! There are even more onboarding tactics out there just waiting for you to try.

Next time you bring in a new hire, make sure you have an onboarding program that blows them away. You want every new employee to leave your office and think, "I'm glad I took the job." And when your workers are happy, there's no end to what your business can achieve.





Notes

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